

Team Hardcore Call Transcription - May 4th, 2017 – Rachael Bodie - Teamzy for Tracking”

[Beginning of Recorded Material]

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00:00:01 Jenelle: And here we go. Hey guys, it's Jenelle. I know you can't see me right now, but we just had a technical glitch on the other link we had, so we are going to restart this and this time we've got Rachel on the screen so I'm just going to keep her on the screen and I will mute myself, but let me just give you a quick introduction. Rachel is a busy mom of two and she's a wife and she's a career businesswoman, has a very important and successful career, and she's only been in the business you guys for one year and she's already a 1-Star Diamond. She's a Success Club All-Star Legend and she's a team leader already. Why and how is she crushing like this? Her time use has to be so effective when she works her business and she knows that the magic is in the follow-up and so what does that mean? It means she's got to be tracking things. She's got to be treating this like a true business, the true business that it is. And so I thought what better person than to speak on the subject of tracking and she uses Teamzy which she'll talk to you about that and every coach uses something different, but many of my successful coaches use Teamzy. So with that, Rachel, go ahead. Take it over.

00:01:15 Rachel: Awesome. Thanks Jenelle.

00:01:17 Jenelle: You're welcome.

00:01:18 Rachel: You guys, I'm not very tech savvy so we figured it out speaking about not having a time of time I mentioned that I just came straight from my workout so how cool is it that we are able to have a business where we are able to do that? I'm really excited to share with you guys today something that I believe has the power to be transformative in your business and I know that's a big word, but I really believe that. And I want to start with us, I know we are a little late, but I want to start with something just very quickly that I think is important and that is an agreement. Whether you are folding laundry, whether you are listening to this while you are doing cardio, or you are taking a break at work, I want you to make either a physical note or a mental note as in going through what I am going to share, I want you to make a note of one thing that you're going to actually do differently, one thing that you are going to act on. The thing that I've been blown away about with Beach Body is the training is phenomenal. I'm going to share my background in a minute but I've

been with John Maxwell for 13 years, so I have a training background, so I have high expectations. And it is great to have lots of powerful information and content and all of these amazing best practices, but if you don't put it in action you guys, it doesn't matter. So I want everyone right now to agree you are going to think of one thing and then before the day is done today because it's only 12 PM Eastern, I want you to put that into action, okay? So here's the thing: so tracking is critical. And really what this is all about today is creating a system for building relationships because that's what we do you guys. We are adding people to our network, we are connecting with them, we are building a relationship to be able to invite them into this business opportunity, into a challenge group, into a free group and that is all about the relationship, right? So, you know, how do I know that? So I have had some success since I started with Beach Body, but as I mentioned I worked directly for John Maxwell for over 13 years as a leadership consultant. So I spent over a decade working for Coca-Cola, Microsoft, CVC, so some of the largest organizations in the world and the reason that I want to share that with you is because the way that I have had success doing that is using a CRM, okay? I'm going to teach you guys something about that today, maybe some of you guys know what that means. A CRM is an acronym for Customer Relationship Management. That's what I use at John Maxwell; that's what Teamzy is. That's what people in these organizations at Coke and Microsoft, that's what they use to manage their business and because we are business owners, we are entrepreneurs, we need to treat this like the business and we have to have systems to be effective. So some of us are really like, "Oh yeah, systems! This is going to be an awesome training. I can't wait," and other of you are like, "Oh my gosh, newsflash, I don't want to be a part of this." So no matter where you fall in that spectrum I want you to really like lean in here because if this is something you're great at, that's awesome. You want to lead in the areas where you are strong. So this is going to come probably a little more naturally. If this is an area where you are maybe a weakness, maybe a relational person, you're better at the connecting and relationship building, I really want you to lean in here because you read where you are strong, but you team or you put a system in place where you are weak, and there's nothing wrong with that. We all have areas of strength. We all have areas that may just be not a huge strength area. This is normal. This is how God has created us. So this system is going to help you to be better at relationships because it's going to make it systematic; you don't have to think about it. So that's what I want to share with you guys today. Okay, so I'm going to show you how I track, what I track. I use a combination of the business activity tracker and Teamzy. Like everything else in this business, I want you to take what makes sense and then, you know, discard the rest. You know, you use what works for you. I just want to share kind

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of my system. I really firmly believe that you cannot manage what you do not measure. If you don't know where your starting point is, how are you going to be able to get to where you want to go? You know, you have to have the system to get there. So this doesn't just happen by accident. You know, this business or any business success takes intentionality. You don't all of a sudden wake up one day like Jenelle and you're a 15-Star Diamond. I wish that was the case, but it doesn't happen that way and so this is going to help you guys with. So, you know, we've got our power hours, right? So when we sit down we have to be laser focused you guys. I mean I know all of us are super busy, we all wear lots of hat. You know, I literally got back from Punta Cana Monday night. Tuesday morning I was downtown at 6 AM because I had a face-to-face meeting with Coca-Cola. I was exhausted, but we have to be intentional, we have to be laser focused. So it's easy for us to sit down, we've got our power hour, we scroll the feed; look and see what this coach is doing, look and see what that coach is doing, watch a training, create a graphic. Next thing you know, two hours are gone. Move your business forward. And you know what guys? I've done the same thing and I was getting kind of frustrated in the beginning. I'm like, "I'm not going as fast as I want to go," and then I realized because I was focusing on things that were fun. It's fun to see what Melanie Mitro is doing and it's cool to create a fun graphic, but those things were not moving my business forward. So this is going to give you something that will force you to look at what you are actually doing, not what you intend to do, you know? In our head we feel like we are doing all this work. So, okay, so we got to lead ourselves well and one of the ways to lead yourself well is you are managing your time. So this is a system that you can use. I want to take you very quickly through that, like super quick, because I wanted just give you an idea of what I'm tracking and more so than that how I am prioritizing because this has been a game changer for me. I'm in another group with Jenelle as cohosting and rock solid and Chelsea Pearson who I had a chance to meet in Punta Cana is amazing. She shared something in that group that just totally like changed my mindset and I want to talk to you guys just really quick on that because last month was my biggest recruiting month. I recruited 10 coaches which I was really proud of because that's been hard for me. The recruiting piece is kind of like a sticking point and so I want to tell you how I did that. I'll give you a little side tip here. So every day...this is the order I do things, okay? This is a brand-new week. Here we are on Thursday. Every day we start with workout and shake obviously. You've got to be a product of the product. Next, personal development. You guys, we have to be doing. If we're not doing that, you're going to get down on yourself. You're going to feel unconfident. You're going to start looking at other people. You know, you guys know the drill on that. Then what comes next; this is the key: inviting. So I was doing all

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these other things and then inviting was coming last and not just that, I was inviting a ton of people to challenge groups and then maybe a few people to the business. And I know everyone talks about this, but all of a sudden I thought, "You know what? Why am I putting the most important thing at the end?" It's like *Eat Your Frog*. Have you guys heard of that book? There's a book by David Allen...no, no, no...Brian Tracy and it talks about if you eat a frog first thing in the morning, it's the worst thing that you're going to do all day. So you find that thing that you really don't want to do and you start with it first. So for me, that's what I've been doing. I try to do 30 business invites a week, which I know is a big goal, but, you know, that's how I hit that number last month. Post: so I have my Facebook personal posts. I do three or four a day. My Facebook like posts - three or four a day. Instagram, that's kind of obvious. I do one post a day. That's my other platform. I know that everyone does different platforms. And then adding...I want to show you guys something here. So I actually write my number where I'm at on each platform, on Instagram, Facebook personal, and Facebook like. And then since we just started the week, I make in note: how much did I increase from last week? Again, you cannot manage what you don't measure. So I look and see, "Oh, okay. I increased Instagram by 66 people. I increased my like page by 144 people." So now I know I can look at the week before and say, "You know what? Last week I had 250 people increase on my like page, so what did I do differently? Something must have changed. I have to go back and look." So this gives you something to baseline so you can kind of manager business. Connecting: I mean that's kind of obvious. That's behavioral messages like, "Hey girl, I saw you just got back from vacation. I love your bathing suit. Where did you get it?" You know, just starting those conversations. Mentoring, which is like a team page, shout outs to my challengers, shout outs to my anything, any type of recognition. Follow-ups: I mean those are all those messages that should be sitting in your Facebook box. I mean you should be getting lots of messages because you're starting conversations. And then friends list: I have curated friend lists, which basically are lists of all the people on my team where you have a custom news feed so you can go in and you can keep up with your team and message and click "like" and "comment" and just connect. So this is what I use in conjunction with Teamzy. So the power of this again, is you can go in every day and kind of see at a glance, "Okay, I can kind of see how my week is going." Now this is kind of tracking the numbers. Now as we get into Teamzy, went back to doing is we're tracking the conversations, okay? So as I mentioned, Teamzy is the way to manage relationships and manage contacts. Teamzy will give you a free 30-day trial and what it will allow you to do is import in all of your Facebook contacts. It's super easy you guys, but here's one thing if you're tuned out I want you to tune back into me. This is really

important. I highly recommend do not go in and rate every one of your contacts and here's what I mean. Teamzy uses a rating system 1 to 5 stars. One star means someone I don't want to market to. Five stars mean someone who's very likely to become a coach or customer. If you have thousands, even if you have 1000 or 500 people, whatever the number is, can you think about how long it's going to take you to go through and do every single one of those people? And I did that and I wish that someone had told me not to do that because I wasted a lot of time. What I encourage you to do is put all of your contacts in there and then as you're having those conversations, then you can make a note of whether they are a three or four or whatever star you want to give them and a star is just kind of like a rating of how likely you think they are going to be to join a challenge group or join as a coach, okay? I'm in a show you an example of how I use this actually, so let me see...oops. Let me kind of share my screen here. We are going to pop on over to Teamzy. Can you see that, Jenelle?

00:12:12 Jenelle: Yes, I can.

00:12:16 Rachel: Okay, great. Okay, so let me show you guys, you know, exactly how we would use this. So let's say that we have a...this is the dashboard so it kind of shows you everything that's going on. Ignore all the zeros. I don't really use this actually. I kind of just use my [unintelligible] for these things. But let me show you this. Okay, so let's say we got a new person. Let's call her Diana Diamond because she's going to be my next Diamond. I'm going to add her in. She's not in my system yet, okay? I just searched for her. She was not here. So because of that I'm going to add her in. I don't have any information aside from her Facebook info. So here we go. Here's Diana Diamond. Okay, so we've had some conversations on Facebook. We've gone back and forth a few times. I invited her to my sneak peek on Friday and she has accepted so that's awesome. So I think she's pretty close. I think she's asked a lot of good questions. I think she's going to be a possible coach. I'm actually going to put her at 84 because I'm not 100% that she's going to actually join. Now here's the really cool thing. This is a game changer you guys: tagging. I didn't understand this for the first few months I was using Teamzy. Here's how you're going to be able to sit down and crush your power hour, okay? What I'm going to do is I'm going to put in here that Diana is a hot prospect. I'm going to tag her as a, "biz hot prospect." I'm also going to tag heard that I've invited her one time to the business: "biz invite one." And then I'm going to go into Facebook. I'm going to look at our conversation. Let's pretend like Diana is Joanna here. I'm going to copy and paste the conversation, click "connect," because this is the way that I have spoken to her basically. You go in here, you select what is it? An email? Did I text with her? Did I talk with her? It was a

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Facebook message and I invited her to the business, okay? Now I'm going to log the connect. Guess what? Everything is now in here. All the notes are in here and now I have her as a "biz hot prospect," and a "bus. invite." The reason this is important you guys is I have a sneak peek on Friday. So what I'm going to do is go down here on my...you can create any tag you want, okay? So I have all these different tags in here and I'm just going to tell you what the important ones are. I mean you see like "beauty counter," I have some other MLMs in here so I know if those are people who are already doing network marketing, but the important one - "biz hot prospect." So here's a list of all my people who I consider to be hot prospects for the business. So you better believe when I sit down to do my power hour, I'm going to go through all these people and make sure that I reach out to them and let them know that I have a call on Friday, a sneak peek into the business. Instead of having to sit down and figure out, "Who do I ask? And who did I invite one time? And who did I invite three times?" This is even really cooler, I think. So let's say that I want to talk to all of the people who I invited three times. In my opinion you should be inviting everyone at least four or five times and when I say invite, let me back up. So the first time you invite them that's considered an actual invite. "Biz Invite 2" is basically follow up. "Biz Invite 3" is your third follow-up. "Biz Invite 4" and so on, and so forth. So look: you have a curated list. So how cool is that? You don't have to sit down and go back and look. It's just all right there for you with all the notes. Look at all these notes. So I've invited this gal four times. She's a Facebook like page lead. That's another thing you guys. You can tag where these leads come from, which is really cool because as you start to recruit, for me, I want to know where did this person come from. So when I do an ad on Facebook, I tag it. So you see I've got this ad Facebook...let's see. Let's just tag this one. March 19: these are all the people that came from that ad. See? Some of them are four. That's a great thing so now I can go back and look at that ad and say, "Huh, I must have done something right there because I'm getting some really good traction." So that's another great thing to be tagging. So you want to tag your business prospects. You want to tag...let's see your "biz hot prospects," your invites, and of course challenge group prospects as well and those invites. I just find that to be really helpful because for me I try to always lead with the business opportunity. Sometimes it just doesn't feel right, but once I lead with the opportunity, they say, "Oh, I'm not sure about that," and then I go and say, "Well you know what? I've got this amazing group. I know you're into fitness. Have you ever done something like a virtual boot camp or a virtual challenge group?" So here, here's all my challenge group hot prospects. So it's the end of the month and you need two Success Club points. Instead of sitting down and trying to figure out "Who do I reach out to?" Here's your list you guys. I mean I'm telling you this is

just like huge because I was using Excel and a notebook in trying to figure out like, "Who do I talk to?" And by the time I like even figured it out I'd wasted, you know, 15 to 20 minutes trying to even go back and look. This just really systematizes it. What else for the tagging? So we tag the "biz invites," we take the challenge invites, we tag the other MLMs, just so you are aware of someone's Plexus or, you know, any of the Advocare. For me, often for my free groups I tend to allow everyone to join in with the exception of like a competing MLM, like maybe an Advocare or Plexus or if someone is [unintelligible]. You know, I let them in my free group. I just kind of watch and ensure that everything is on the up and up because I want to have an abundance mindset. And then of course we have our ads. I think that's really important to kind of see where all those hot prospects are coming from. I think that's pretty much it for the tags. Oh the only other thing that I do tag is I will tag where my Instagram leads come from. So for me that's just another platform that I'm using. So I want to see where those leads are coming from. So hopefully this kind of shows you the efficiency that is available to you with the system and whether you use this system or any system, I think really what I want to drive home to you today is you have to have some type of system you guys. I connected with Meg Wiczynski. She was at Punta Cana too and she said, "Oh my gosh, the train was so helpful and now I'm using Teamzy," and I'm kind of like...because I know she was using a notebook before and I'm like, "How...?" I remember watching one of her trainings and I'm like, "How does she do this? It's too much for me," and it really encouraged me that someone at that level just always has that mindset of always growing. So, you know, we have to have that mindset too. We have to always be learning and growing and trying new things. So if this is new to you - tracking - that's cool, you know? It was new to me too, but you guys have the tools to do it. So if you want my bad I'm happy to share my bad. If you have any questions about Teamzy, you're welcome to message me, but I just want now to just take that minute or that 30 seconds to think about, "Okay, what am I going to do differently? Am I going to try for one week to use [unintelligible]? Am I going to try a free 30 days of Teamzy?" I mean I know there's a number of...Streak and all these different ones out there. I just want you to think about what is the next thing you're going to do to change your business and how you are going to act because that's how you create change is through action. So I hope this was helpful you guys.

00:20:14 Jenelle: So, so helpful Rachel. Hold on one second. I'm just making sure I've got all these messages that popped up. Gone. Okay, so that was incredible and I know anyone listening is like, "Wow, what have I been doing all this time and how did I even think I would have success without using this?" I know that's how I feel when I watch this

because, you know, when I as a coach, as a new Beach Body coach, we didn't have this and we didn't have tracking systems so I really just used my Excel spreadsheet and then I moved over to Notebook, Notepad and, you know, I've always been tracking and now thankfully my assistant helps me with tracking and I have to correct myself whenever I say assistant because she's more like my business VP. But anyway, there's no doubt about it that if you're not tracking, you don't have a business. If you're not working from a list, you're not really truly working your business. And so I do have a couple of questions though. First of all that BAT, which I love. I know I've uploaded it to several of my groups. I'm not sure if I've uploaded it yet to Coach Success. So you guys listening, I will upload that or make sure that that's uploaded to the Coach Success Facebook group because I really recommend that you use this BAT. That of course stands for Business Activity Tracker. So basically she's obviously tracking conversations and relationships in Teamzy. She's tracking her weekly overall week at a glance, tracking with using her BAT, the Business Activity Tracker which is so incredibly important. Now Rachel do you have marked in there...maybe I missed it...how much time in between following up with people? That's a question...I, you know, I know my answer for that, but I know have that question: how do you know when the follow-up?

00:22:09 Rachel: That's a great question. So I think for me our business is such an emotional business, whether it's joining the challenge group or joining the coaching opportunity, the business opportunity, and because of that I think that time is of the essence. So you don't want to be annoying and like, you know, you just message them and you message them the next morning at 8 AM. But if I message someone, in like a day or two I will follow up. And then I think it really too depends on the conversation. Like if I sort of leave the ball in their court and I'm waiting for them to come back to me with something, then it's natural to follow up. If they are kind of giving me signals like, "I'm not sure," I may say, "Hey, can I follow up with you the next sneak peek that I have?" So I think it sort of depends, but in general, for me, I think you don't want too much time to pass because when people decide they want to do something, they just can change pretty fast. It's like all of a sudden. This was on their radar and now it's not. And for me I have a high sense of urgency. It's just my personality. I'm like a bit of an activator. So I think, my personal opinion would be err on the side of following up sooner than later.

00:23:26 Jenelle: Perfect, perfect response. Err on the side of sooner than later, but also realize it sometimes depends. You have to really be in tune with what that person...the signals they are giving off. I think that's so incredibly important because there might be one person

where you're like, "Oh my gosh, you know, we've got to talk again tomorrow," and another person you are like, "Oh she's going through so much. Perhaps this week is like incredibly traumatic for her. I'm not going to follow up with her this week. She needs to, you know, even be unplugged completely from social media." Okay, so that's great. And then the other question was one this really has nothing to do with tracking. I just know everyone listening is going, "She uses Facebook ads." You know, some coaches do, some coaches don't. Pretty much all coaches that follow my trainings know that I do and so I know people are going, "Oh okay, so Rachel does too." And now Rachel, with your Facebook ads...so this has nothing to do with tracking, but with your Facebook ads do you typically do a boosted post? Do you typically do a targeted ad? Do you typically just target people who have liked your page? Like what's your...and I'm...by the way, FYI, side note I am going to do a training on this I think next week, but anyway, what's your approach?

00:24:38 Rachel: It is so funny you are asking me because literally I wrote down in my book yesterday, "Research Power Editor, boosted vs. like." You did a training in Rock Solid on how to do a targeted and I'm like, "What have I been doing? I've never done something like that." So last weekend I did a targeted ad. You guys, it reached 14,000 people. I had 253 likes on it. I'm like, "Holy crap! [unintelligible] with all these people." And here's a really interesting sidebar. So you mentioned the assistant thing. Very early in my business, way before I was making any money you guys, I decided I'm going to run this like a business so I'm going to reinvest...and I was making some money. That's not entirely true. What I meant was I reinvested the money I was making into an assistant because I don't have time with what I'm doing at John Maxwell to be able to do some of the things that you need to do to move your business forward. For example, with those 253 likes I have my assistant go in with them all into Teamzy, okay? So she tracked all them, message every single one of those people with a stock like, "Thank you so much for like. I know it only took a second, but that means a lot, you know, just show your support. Is there anything about what I do that interests you?" Or, "Hey, is there anyway that I can serve you in your fitness goals?" And guys, I got a lot of responses back, but again that goes back to investing, tracking, and now I can go in very quickly and go to that ad and see that's where that ad was. So, to answer your question, that's the first time I ever did the targeted ad. What I was doing before was I was going in and basically boosting posts, okay? And then...so I'd do a business post and then I would boost that post. Usually for me I would do \$100 from like maybe two days. That's one that I was doing. And then the other thing I noticed some very successful coaches doing is like a sponsored ad to increase followers on your like page. I just started doing that two

months ago where I created a banner or again, my assistant died because I am terrible at graphics, so know your strengths. [Unintelligible] find a system or team where you're weak. I don't do that. Kim Filee, my success partner, is a rock star at graphics. I am terrible. It takes me like five hours to do it. She created a graphic for me and I used that. I boosted it and how much did I spend on that? This may freak you guys out so I'll want to freak anyone out, but again I reinvest what I am making, so I spent \$500 in a month, okay? So I know that's a lot of money. I'm growing my following; I'm growing my baseline there on my like page and I'm reaching out to those people and as a direct result and recruiting new coaches that I would be able to touch otherwise and very early on in the business Jenelle sent out an email or a message somewhere where she was talking about 15-Star Diamonds spending a few thousand dollars a month on Facebook ads. And I was like, "Holy cow! \$2000? That's crazy," and then I started researching it and reading Gary B. and doing research marketing and I found there's a return on investment. So that's one thing that I've been doing that's worked for me and I know it's different for everyone so, you know, I want to caveat that I know that's a lot of money. But it just goes back to what are your goals and are you willing to reinvest in your business? Because, you guys, like any business, you have to invest for it to grow.

00:28:21 Jenelle: Exactly. Now I'm so glad you shared that because people need to know these things and need to know what's realistic and I do think that investing in a business opportunity post is going to give you a great return on investment. I mean even if you...you know, let's say you get, you know, 15 - 20 people who are very interested in the business opportunity from that post over the course of a couple of days and from that 15 to 20 people you have...maybe I don't know...five that actually join your team. You guys, those could be your 5-Star, 10-Star, 15-Star people on your team 3 - 4 years from now. Don't think for a second that's not going to pay off huge, huge, huge. So, you know, Facebook I think you can hear from any business person they are a great place to invest. Do have to, you know, do some testing and tweaking, there's no doubt about it. So if you are a brand-new coach, don't just go dropping \$500 on an ad when you haven't figured out what kind of post of yours even works and what your messages are, you know, that's why we always say, you know, "Get your groove on your personal page first."

00:29:37 Rachel: Totally. That's a great point. Yes, and I will say like I didn't even start a like page until I think maybe four months into the business because I wasn't on social media. I only posted a few times...maybe a few times a year, honestly. I had no idea what I was

doing. So, you know, this is after a little over a year that I just started doing this.

00:29:58 Jenelle: Yes. Okay, will that so, so good to hear and of course you guys, even if you are against doing Facebook ads there are lots of other ways that you can be, you know, adding people to your network every single day – through YouTube, through Instagram, and really, really building up your list within Teamzy. So Rachel, thank you so much for this training. It's absolutely phenomenal and one that's just so needed on the team. Thank you.

00:30:22 Rachel: My pleasure. Thanks for having me.

00:30:24 Jenelle: Thank you. Okay guys, we will see you next week and like I said I think I'm going to do it on Facebook ads so stay tuned. Have a great afternoon everyone. Bye.

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[End of Recorded Material]